### Your guide to salary packaging with Smartsalary



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## Salary packaging with Smartsalary

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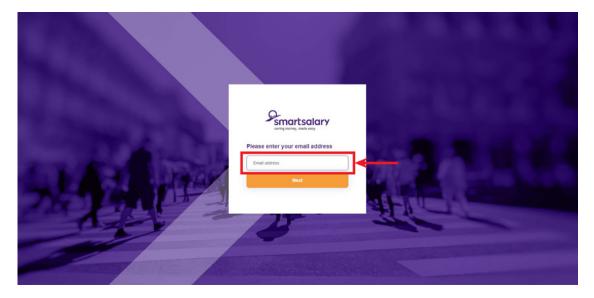
## > Accessing your account



For your security, we use two-factor authentication as part of the login process. This means you need the code we send to your phone and your email address.

#### To see how it works, follow the steps below

• Enter the email address registered with Smartsalary (usually the one we use to communicate with you).



- A verification code will be sent to your registered mobile number.
  - 1 Enter the code received from Microsoft (usually sent in under a minute).
  - 2 If you didn't receive a code, select I didn't get my code to have it resent.
- To have the code emailed, select 3 'Sign in another way'.
   Once you confirm your mobile number, date of birth and postcode, the code will be sent.



# > Work for more than one employer?

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If you salary package at more than one employer, on your account dashboard, click the '**cog**' icon to select the account you need.

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## > View your benefits

Click the benefit for more details and to access quick links to reports and online claims (if applicable).

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## > Add a benefit

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- Click 'Add benefit' for details on the benefits you can include in your salary packaging.
- Click 'Find out more' for further details and the supporting documents required. If you're ready to start, click 'Apply now'





## > Updating your details

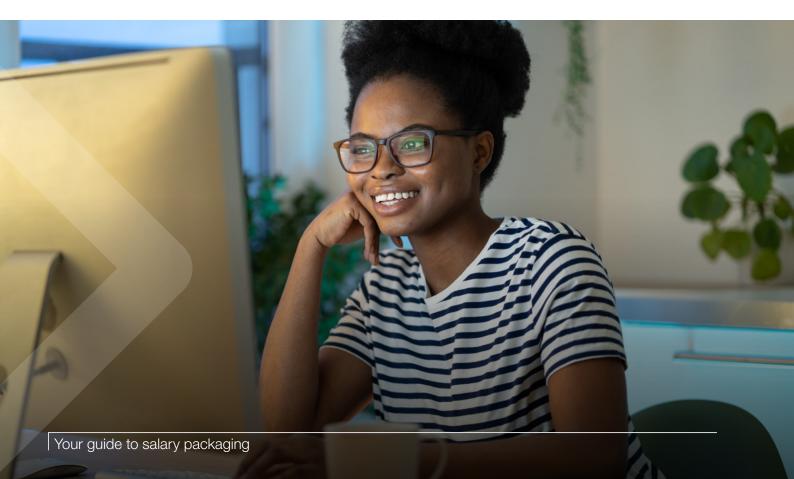


### If any of your salary packaging details have changed, it is important to update this information on your account.

View your current details by choosing one of the menu options on the left-hand side.

For example, to update your bank account details, select 'Reimbursement details'.

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## > Submitting a claim

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The quickest way to submit a claim or provide documents or receipts so a balance for an existing benefit can be paid out to you is via E-claims. Here you can also track and view previously submitted claims.

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	🚓 🥘 My benefits 🧐 eClaims	S My personal details	👔 FAQS 🛛 🎯 F4	orms S Rewards		
leethast	Activity summary  Activity summary  Available reimbursement balance  \$0.00  Spendable balance  \$0.00  Portion of salary currently being packaged  Update percentage	Deductions		View my salary packaging calculator Recent claims (past 90 days) Pending claims 0 Partally approved claims 0 Full approved claims 0 Recent cclaims history > Submit a new claim		
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• In the E-claims menu, select either 'Submit new claim' or 'Track my claim'.

- To submit a new claim or provide updated documents for an existing benefit, select the benefit and the
  expense type. Enter the dates and amounts of all transactions you are including (you can submit multiple
  receipts/files in the same claim), then upload your receipts. (You can upload up to 10 megabytes (MB) and
  the following formats are accepted: PDF, JPEG/JPG, BMP, TIF/TIFF, PNG or GIF).
- Check that your bank account details are correct as this is where the payment(s) will be made.
- Accept the declaration and submit your claim.



#### Uploading supporting documents

Providing supporting documents and keeping them up to date is important to keep your salary packaging payments going. For some of the most popular salary packaging benefits such as mortgage and rent, you only need to provide the documents once. For other that are claimable under the tax-free cap or entertainment expenses, you'll need to submit a claim, along with receipts, for reimbursement.

Follow the instructions on "Submitting a claim" to do this.

## > Changing your deductions



To change your deductions, follow the steps below

- Choose the benefit you want to change from your account dashboard and click 'View details'.
- Click 'Change your deductions' from the left-hand menu to change the per pay amount, the total amount, or the number of pays you'd like to package over, then click 'Submit'.

You have \$8259.14 left to	o claim on your tax-	free cap for the current FBT	year.
When would you like to s packaging this benefit?	start salary	Number of deductions t benefit?	o pay your
19/12/2019	~	8	~
Enter how much you wou amount' this FBT year.	uld like to package e	ither as a 'per pay amount'	or a 'total
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# > Changing your superannuation contributions

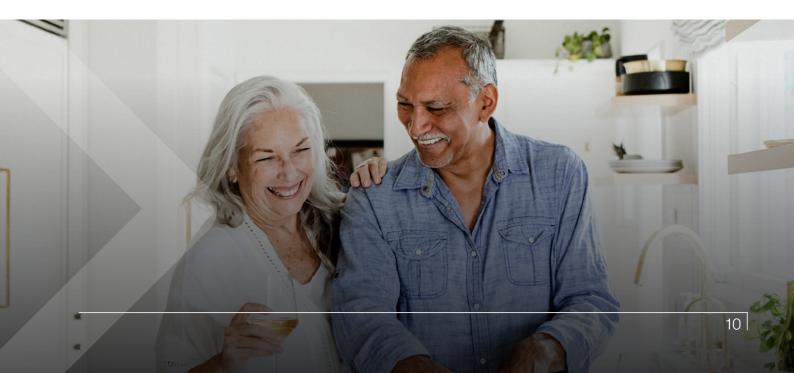


To change your super contributions, follow the steps below

• Select 'View details' under the superannuation banner on your account dashboard or from the 'My Benefits' menu.

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- Then make the changes you need (cancel your contributions or change the per-pay amount).
- Confirm the changes by clicking 'Submit'.



# > Changing or managing your vehicle budgets



Just follow the below steps to manage and increase your vehicles budgets directly via the Smartsalary website.

• Select 'View vehicle details' under the Novated leasing overview banner on your account dashboard or from the 'My benefits' menu.

Novated leasing overview (for vehicle )		
Vehicle	Last odometer reading:	1 View vehicle details
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• Select 'Manage my budgets' on the vehicle expense you wish to increase. You'll also see options to view other details and products for your vehicle.

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ehicle :	~	Filter by :	Last 12 months	~
Manage my budgets	>	Fuel		Manage budget 2
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View full transactions	>			
Fuel cards	>		View Transacti	ons
Days unavailable	>	Maintenance		Manage budget >
My products	>			\$0.00 of \$340.44
Add new products	>			
My odometer reading	>		View Transacti	ons

- Enter the new annual budget amount (the reduction of vehicle budgets cannot be done online).
- Confirm the changes by clicking 'Submit'.

## > Downloading forms

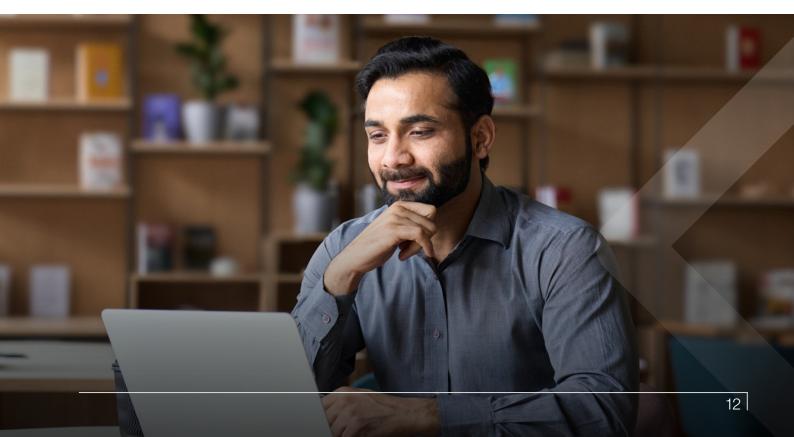


Some benefits and account changes require a form to be manually completed such as nominating a Third-Party authorisation.

• Select 'Forms' from the top menu and click the download icon 📩 to save the form to your device.

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	Forms	View my salary packaging calculator
	Benefit forms	Recent claims (past 90 days)
	Associate Lease Application Form	Pending claims 0
	Credit Card / General Expenses Claim Form	Details > Partially approved claims 0
	Credit Card-Living Expenses Claim Form (St. Vincent's Outreach Service Bathurst or Lourdes Hospital Du	
	Development Travel Claim Form	Recent eClaims history >
pad	Financial/Taxation Advice Claim Form	*
Feed	Income Protection Insurance Claim Form	Submit a new claim
	Membership Fees and Subscriptions Claim Form	L Contact Us
	Mortgage-Rent Claim Form	<u>*</u>
	Mortgage-Rent Claim Form (St. Vincent's Outreach Service Bathurst or Lourdes Hospital Dubbo only)	Use the SmartFAQ
	Novated Lease Application Form	find instant answers and useful
	Self Education Claim Form	information at our SmartFAQ page.
	Smartsalary Benefit Card Application Form	Our Customer Service Centre is open Monday to Friday, Sam to Spm
	Smartsalary Benefit Card Application Form	(AEST).
	Superannuation (Commercial Fund) Claim Form	<u>*</u>
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	Salary Packaging Application Form - CHCS Casual Staff	*
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• Print and complete your form and send it back to us.

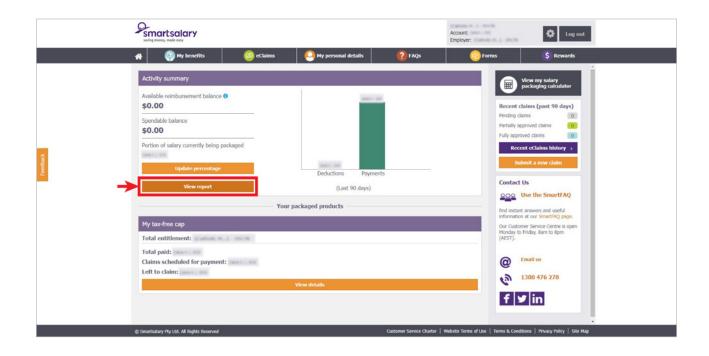


## > Salary packaging reports

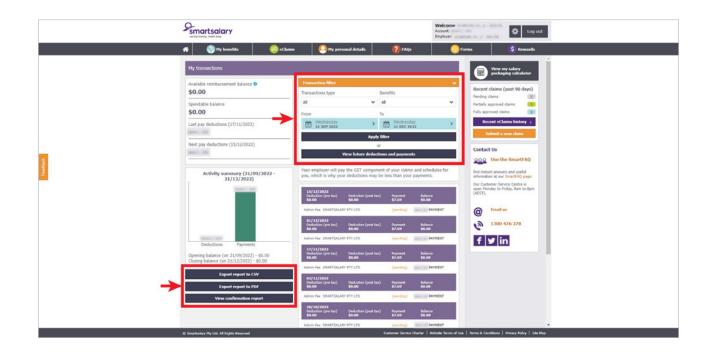


Salary packaging reports are available from the account dashboard under 'Activity summary'.

• Simply select 'View report'.



• You can filter your deductions by date and/or benefit. You can also download and print your salary packaging transactions or Confirmation Report.



### Need help?



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To learn more about salary packaging visit us online or call:

smartsalary.com.au 1300 476 278